



# HELPING YOU **STAND OUT** IN THE CROWD

Jacqueline Silva

Financial Media Relations and  
Marketing Consultant

# Biography

Jacqueline is a financial media relations and marketing professional with 7 years of experience in finance, media and public relations, as well as marketing.

As a former investment banker and Series 7 holder, Jacqueline is able to combine her financial background with her experience in leading media relations' programs for broker dealers, trading technology providers, financial consulting firms, and asset managers, to produce top media results and targeted marketing campaigns for her clients. Jacqueline has both *in-house* and *agency* experience and has worked with top financial firms including, Thomson Reuters, Sapient Global Markets, GAMCO Investors, Raymond James, and JMP Securities.

Jacqueline received her Bachelor of Arts in International Relations, with a focus on Foreign Economic Policy, from Tufts University. She also received a Business Certificate, with a focus on Corporate Finance, from Columbia University.

# Services

## Media Relations

- ✓ Development and Execution of Media and Analyst Relations Programs
- ✓ Placement in Top Tier and Financial Trade Publications
- ✓ Media Coaching and Training
- ✓ Production and Placement of Contributed Media Content
- ✓ Social Media Programs Advisement and Execution
- ✓ Drafting and Distribution of Press Releases

## Marketing

- ✓ Marketing Materials and Website Content Creation
- ✓ Advisement on Internal Messaging and Sales Programs
- ✓ Creation of Award Submissions
- ✓ Creation and Submission of Conference Speaking Proposals
- ✓ Conference Advisement and Coordination
- ✓ Event Planning for Internal, External and Media/Analyst Events

# Professional Sample 1: Training the Street

<b>Company Description</b>	Training the Street (TTS) is a financial training company for investment banking professionals and MBA students.
<b>Marketing &amp; Media Objectives</b>	<ol style="list-style-type: none"><li>1. To increase TTS' visibility in the financial training sector and amongst its potential customers – investment banks, MBA programs, and financial professionals.</li><li>2. To establish the credibility of TTS' instructors by promoting thought leadership and raising awareness of their expertise.</li></ol>
<b>Target Publications</b>	In order to establish TTS' credibility in the financial sector, Jacqueline focused on top tier financial publications (i.e. <i>Wall Street Journal</i> , <i>Dow Jones</i> publications, <i>Barron's</i> , <i>Financial Times</i> , <i>Bloomberg</i> , <i>Thomson Reuters</i> ).
<b>Media Results</b>	Secured Features, Mentions, and Direct Quotes in: <ul style="list-style-type: none"><li>• <i>Financial Times</i></li><li>• <i>Bloomberg</i></li><li>• <i>Wall Street Journal</i></li><li>• <i>Reuters</i></li><li>• <i>Fins Finance</i>, a <i>Dow Jones</i> publication</li></ul>

# Media Results: Training the Street

Over a 6 month period, Jacqueline consistently connected with the *Financial Times* Business Education Editor to secure the following placement and TTS' participation in *FT.com's Ask the Experts* live Q&A session.

In addition to this highly visible placement, TTS' CEO answered questions from readers on financial training with the *Financial Times* Business Education Editor, replacing TTS' largest competitor who participated the prior year.

This placement appeared online and on the front page of the *Wall Street Journal's* "Marketplace" section.

Because TTS's client base includes MBA programs, extensive media coaching was held prior to the interview. The goal was to promote hands-on, practical training in MBA programs.

Scott Rostan, chief executive of Training the Street, a company that provides financial education for Wall Street employees and business school students, sees demand closer to home too. "At the start of the financial crisis, enrolment dropped off, but in 2010 we saw a noticeable return."

However, both report that the numbers in the US have slowed this year. "Hiring numbers are flat compared with 2011," says Mr Rostan. "But I will say that optimism is better than six to nine months ago." Mr Robinson also reports minimal growth in the US, but says Europe is still buoyant. "One of the things that surprised me is that in the UK the number of candidates is up by 18 per cent."

While Mr Rostan believes it is the opportunity for personal

"Firms are looking for talent. They're not looking for content knowledge, per se," says Scott Rostan, founder of Training the Street Inc., which provides financial training courses for new hires at a number of investment banks. "They're not hiring someone just because they took an M&A class."

Business degrees have been offered since at least the 1800s, but they were often considered vocational programs. Some experts argue that the programs belong at trade schools and that students should use their undergraduate years to learn something about the world before heading to business school for an M.B.A.

## BUSINESS EDUCATION Financial Training

Changes come in response to optimism



THE WALL STREET JOURNAL.

## BUSINESS EDUCATION

### Rethinking the Value of Business Majors

Continued from page B1

Such changes should appeal to students, who have been seeking well-rounded education from other disciplines, such as English, economics and engineering. But financial companies have sharp criticism of the skills and problem-solving techniques that business majors

"Firms are looking for talent. They're not looking for content knowledge, per se," says Scott Rostan, founder of Training the Street Inc., which provides financial training courses for new hires at a number of investment banks. "They're not hiring someone just because they took an M&A class."

Business degrees have been offered since at least the 1800s, but they were often considered vocational programs. Some experts argue that the programs belong at trade schools and that students should use their undergraduate years to learn something about the world before heading to business school for an M.B.A.

Introducing such concepts early to students' academic careers should help them "reorient the clock," says Daniel Gorenfeld, associate dean for undergraduate programs at the business school.

Even some European schools, which have encouraged a narrow focus in college studies historically, are looking to expand.

Education is more than technical training," says Alfred Kieser, director of university programs at E.ON. He says the utilities need to be "retrained" in the rest of the program.

Business degrees have been offered since at least the 1800s, but they were often considered vocational programs. Some experts argue that the programs belong at trade schools and that students should use their undergraduate years to learn something about the world before heading to business school for an M.B.A.



requirements, he enrolled in business training and art history, among other courses. Others are also looking for a more holistic education. Mr. Rostan will begin a job in financial training at the end of the year. He believes that training in business is a valuable perspective "about the field."

Yet, the field of campus recruitment for the American business school is still in its infancy, says that about half the bank's new analyst hires in recent years have come from business, finance, economics or accounting, but that "students from nonbusiness backgrounds have a valuable perspective."

Still, she says, applicants from the liberal arts often need to "undertake extra due diligence on the industry."

# Professional Sample 2: Lucena Research

<b>Company Description</b>	Lucena Research is a provider of investment portfolio technology for registered investment advisors, individual investors and hedge funds.
<b>Marketing &amp; Media Objectives</b>	<ol style="list-style-type: none"><li>1. To establish the credibility of Lucena Research's technology.</li><li>2. To increase Lucena's brand awareness in the financial technology space.</li></ol>
<b>Target Publications</b>	Because Lucena was a newly launched company, Jacqueline targeted key financial trade publications (i.e. <i>Advanced Trading, Automated Trader, Markets Media, Waters Technology, FinExtra</i> ) in order to bring awareness to the brand within the financial technology sector.
<b>Media Results</b>	Secured Features in: <ul style="list-style-type: none"><li>• <i>Automated Trader</i></li><li>• <i>Markets Media</i></li><li>• <i>Wall Street and Technology</i></li></ul>



# Media Results: Lucena Research

As the use of artificial intelligence (AI) in finance was a hot news topic, Jacqueline brought Lucena to the forefront of the conversation.

This feature in *Automated Trader* was secured by Jacqueline three months prior to its publication. The story was posted online as well as in the quarterly print version. It not only featured Lucena's use of AI, it also included headshots of the Company's management and screenshots of the technology.

Lucena went live with its product last December in a web-based format, and it has launched the line-up on the Bloomberg platform. Balch said the target market is smm hedge funds that want scientific validation of their strategies, as well as investment and wealth management advisors who want to attract more assets using modern tools.

The soldier's friend makes it all sound so easy. Just remember what the human did and do likewise in similar situations. The reality is a more complex affair.

Balch said there are some 30 data items including price, volume and fundamental data which together produce about 180-200 different indicators. An example of a fundamental data item might be the number of days since the last quarterly report. Out of those



This article also featured Lucena's use of AI.

In the featured article, "Man and Machine in Search of Alpha," *Markets Media* explored Lucena's technology in depth and included headshots of the Company's management.

Lucena Research develops advanced tools that leverage artificial intelligence for price prediction, hedging, and other complex portfolio management tasks.

"I've come to believe that the best portfolio management requires a combination of human and machine," Balch said.

The critical test in applying machine-based learning and other forms of artificial intelligence to trading is whether it can generate alpha, or returns that exceed those that could be attributed solely to market forces.

QuantDesk, Lucena research's flagship product, incorporates over 200 fundamental, technical, and proprietary time series indicators to exploit market opportunities with precision, and scientifically validate and assess investment decisions.



Man and Machine in Search of Alpha  
Posted on April 26, 2013

Three main machine models in trading are being continuously tested, but the evidence so far seems to be that human and algorithmic-based trading are very close to the same risk, especially when it comes to the risk of a major loss.

"Humans are great at big picture... [data analysis], but machines are able to do things we can't," said Tucker Balch, professor of computer science at the University of Texas at Dallas. "A computer can process 100,000 different indicators, but a human can only process a few."

Lucena Research develops advanced tools that leverage artificial intelligence for price prediction, hedging, and other complex portfolio management tasks.

"The critical test in applying machine-based learning and other forms of artificial intelligence to trading is whether it can generate alpha, or returns that exceed those that could be attributed solely to market forces."

QuantDesk, Lucena research's flagship product, incorporates over 200 fundamental, technical, and proprietary time series indicators to exploit market opportunities with precision, and scientifically validate and assess investment decisions.

QuantDesk, Lucena research's flagship product, incorporates over 200 fundamental, technical, and proprietary time series indicators to exploit market opportunities with precision, and scientifically validate and assess investment decisions.

# Noteworthy Clients

## **Thomson Reuters Financial & Risk**

- Led US media and analyst relations programs for Reuters' Eikon, their flagship financial information platform, and Elektron, their low-latency infrastructure for electronic trading and data distribution.

## **Sapient Global Markets**

- Led media relations program for energy, commodities, and enterprise risk consultants. Created and submitted all award submissions and conference proposals. Drafted all press releases.

## **Raymond James**

- Led media relations program for the RJ energy trading desk, research, and the RJ Chief Economist, Scott Brown.

## **GAMCO Investors**

- Led media relations program for High Dividend Yield fund and its portfolio manager, Barbara Marcin.

## **BAE Systems Detica**

- Led financial media and analyst relations programs for Detica's financial fraud detection software, NetReveal, and its cyber security software, CyberReveal.

## **JMP Securities**

- Led media relations program for real estate, energy, and telecommunications analyst research.



# Contact Information

## Jacqueline Silva

Email: [Jacqueline@SilvaPR.com](mailto:Jacqueline@SilvaPR.com)

Phone: (917) 880-2464

Website: [www.SilvaPR.com](http://www.SilvaPR.com)

Twitter: @JacSilvaPR